

Transaction Overages

With Transaction Overages on, your plan limit never delays a deal. Keep creating transactions past the limit at a flat \$15 each — waived if you upgrade in the same billing cycle.

Introduction

Transaction Overages is an optional billing feature. Turn it on, and your office can go past your plan's transaction limit, paying a flat \$15 for each transaction over instead of committing to a plan change. It's built for the busy month that runs a few transactions long, so your team keeps working when it would otherwise stop at the limit.

If your overages ever reach the point where upgrading would cost less, we'll tell you, so you can move to a higher plan instead of stacking up more \$15 charges. Upgrade in the same billing cycle and your overages fold into the new plan, fees dropped, so you never pay twice for the same transactions.

It's off by default. Your master admin turns it on or off from the Upgrade / Downgrade page.

Benefits

Your deals never wait on a new billing cycle

Hit your limit at 9pm with a contract to log? Turn overages on, create the transaction now, and sort out the plan later.

Your whole team keeps working

No bottleneck at one person's desk. With overages off, hitting your limit blocks new transactions for everyone until a master admin upgrades. Turn it on and your agents and admin staff keep adding transactions right away.

Pay only for what you use

A flat \$15 per extra transaction, nothing more. You cover just the overflow, instead of buying a higher plan for the whole month.

How It Works

Every busy office hits this: it's the end of the cycle, you're at your limit, and you need one or two more transactions to close out the month. With the setting on, transactions past your limit go

through at a flat \$15 each. With it off, Pipeline blocks them, as always.

It's off until a master admin turns it on

This call sits with your master admins: hold the account to its plan limit, or allow overages past it. By default it's off, so Pipeline works as you're used to: hit your quota and new transactions are blocked until the cycle resets or you upgrade. Switch it on and the account keeps creating past the limit at a flat \$15 each.

Overages are charged automatically

With the setting on, every transaction past your limit adds a flat \$15 automatically. No extra step, no approval. Only new transactions count, the same ones counted toward your quota, so editing or changing the status of an existing transaction never adds a fee.

Upgrade in the same cycle and the fees come off

Upgrade to a higher plan before the cycle ends and your overages fold into it. The \$15 fees drop off, and your next bill shows the new plan amount with no per-overage charges.

We'll tell you when upgrading saves money

When upgrading would cost less, we'll email your master admins with a link to the Upgrade / Downgrade page. If overages are still more affordable, you won't hear from us.

Turn On Overages

Turn overages on ahead of your busy months so your team never stalls at the plan limit, and you can settle on a plan when it suits you instead of scrambling to upgrade mid-deal.

Who can do this: Master admins only, on the 350 Transaction Plan and below.

To turn on Transaction Overages:

- 1 Click your name in the upper-right corner, then [Admin / Settings].
- 2 Click [Upgrade / Downgrade] under *Billing* on the left menu.
- 3 Switch the *Transaction Overages* toggle on, then click [Enable Overages].

Transaction overages are available right away. From here on, any transaction past your limit goes through and adds a \$15 charge.

Turn Off Overages

Stop allowing transactions over your limit. Pipeline holds your team at your limit until the cycle resets or you upgrade.

Who can do this: Master admins only.

To turn off Transaction Overages:

- 1 Click your name in the upper-right corner, then [Admin / Settings].
- 2 Click [Upgrade / Downgrade] under Billing on the left menu.
- 3 Switch the *Transaction Overages* toggle off, then click [Disable Overages].

Overages already created this cycle still bill at \$15 each, but no new ones can be added. Once you're at your quota, new transactions are blocked until the cycle resets or you upgrade.

Transaction Overages FAQ

What is Transaction Overages, and what does it cost?

It's an optional billing setting that lets your office keep creating transactions past your plan limit without upgrading. While it's on, each transaction over your limit is a flat \$15.

Will I be charged automatically when I go over my limit?

Yes, but only when the setting is on. With it on, each transaction past your limit adds a flat \$15, with no separate approval. With it off, going over simply blocks new transactions are blocked until you upgrade, and nothing extra is charged.

Is there a cap on how many overages I can run up?

No. There's no cap on overages in a cycle, so a very busy month can add up. You're covered two ways: you can turn the setting off anytime, and we'll email your master admins the moment upgrading would cost less than staying on overages.

Can my agents create overages, or only master admins?

Only master admins can turn the setting on or off. Once it's on, anyone who has *Create Transactions* permission can go past the limit and add a \$15 charge. Want to control that? Leave overages off so the account stops at your plan limit, or upgrade your plan instead.

Does turning on Transaction Overages upgrade my plan?

No. Turning it on doesn't change your plan or your monthly base price. You stay on your current plan and pay \$15 for each transaction over its limit. Upgrading is a separate choice you make from the Upgrade / Downgrade page.

Should I use overages or just upgrade?

Use overages when you only go a little over your limit for a month or two, since you pay \$15 per extra transaction instead of a whole month at a higher plan. Upgrade when the higher volume is here to stay, or when your overages would add up to more than the next plan costs. We'll email you the moment upgrading becomes more affordable, so you don't have to do the math.

Can I avoid the \$15 overage fees?

Yes. If you upgrade to a bigger plan before the billing cycle ends, your overages roll into the new plan and we waive every \$15 fee, so you're never charged twice for the same transactions.

A master admin makes the change on the Upgrade / Downgrade page (click your name, then Admin / Settings, then Upgrade / Downgrade under Billing). Your Transaction Quota jumps to the new plan's limit right away, and your next bill shows the new plan amount instead of the per-overage charges.

Which plans can use Transaction Overages?

It's available on the 350 Transaction Plan and below. The Unlimited plan doesn't use the toggle, because it handles overflow its own way: it includes 450 new transactions a month, then automatically bills a low per-transaction rate for each one after that.

Where do I see how many overages we've used?

In the Current Usage window on the Home page and in Admin / Settings, transactions created against your quota shows how far over you've gone, and every overage is itemized on your monthly receipt.

Ways to Use Transaction Overages

Leave it on year-round

Keep Transaction Overages on as your standing setting, and busy months never catch your team at the limit. There's no monthly decision to make: when volume spikes, work just continues.

Cover a one-off busy stretch

Got a single big month? Leave overages on and pay a flat \$15 per transaction over, instead of moving up to a higher plan you won't need the rest of the year.

Close deals after hours

Hit the limit at 9pm with a contract to log? Create the transaction now and keep the deal moving, then decide whether to upgrade in the morning.